Excel 2007

Enabling Macros and Active X:

If you are operating MS Office 2007, upon opening the new CJA 20 form you will see a security warning (as pictured below in Figure 1).

1) Click on the Options button
2) Select Enable this content by clicking on the circle next to it (Figure 2 below)
3) Click Okay

Once you have completed this step you should be able to enter your information into the services and expenses tabs.

Figure 1

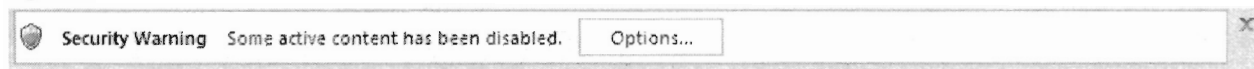|		
🛡 Security Warning	Some active content has been disabled.	Options...

Figure 2

Automated CJA 20 Hourly Spreadsheet
Setup and Instruction Guide

- Next to the **Expenses** tab is the **SUMMARY** worksheet tab. This worksheet will automatically summarize costs of items entered on the **Services** and **Expenses** worksheets.

Completing the CJA 20 Hourly Spreadsheet

NOTE: The top header of the **Services** tab (**Figure 7**) has the following mandatory fields. Once these fields are completed on the **Services** tab, the data will simultaneously populate to all the other tabs.

Attorney: _____

Defendant: _____

Material Witness: _____

Case No: _____

Judge: _____

Bill Dates   From: _____

To: _____

Figure 10

REMINDER: Hourly rates are determined by the DATE entered, so **PLEASE** check your work!

Complete all appropriate fields as indicated below. **Remember that "In and Out of Court" time is recorded in tenths of an hour (6 minutes = .10).**

A.   Completion of the **Services** Worksheet

1.   Enter the header information. This information will automatically populate to the **Expenses**, **Summary**, and **Voucher** worksheets.

Attorney	-Enter attorney's name
Defendant	-Enter the defendant's name as it appears on the docket
Material Witness	-Enter the material witness's name as it appears on the docket
Case No.	-Enter the criminal/mag. case number assigned
Judge	-Enter the Judge's initials
Bill Dates	-Enter the "from/to" date range of the billing - it is **MANDATORY** that BOTH of these fields are filled in before entering any services or expenses. If left blank a reminder message will direct the cursor back to the date fields.

2.   Enter the line by line data for "In and Out of Court" activity. Enter the date (MM/DD/YY), description of the entry, document number reflected on the docket in ECF (if applicable), number of pages for disclosure reviewed or motions filed, and time worked in the appropriate columns 15a. through 16e., as applicable (**Figure 8**). (**Remember that billable hours are claimed in tenths of hour; 6 mins. = .10).** The hourly rate will automatically be applied to the time charged. The following columns correspond to the lines on the CJA-20 voucher.

In Court

- 15a - Arraignment and/or Plea Hrg
- 15b -Bail & Detention Hearing
- 15c - Motion Hrg
- 15d – Trial

- 15e – Sentence Hrg
- 15f – Revocation Hrg
- 15g – Appeals Court Hrg
- 15h – Other

Out of Court

- 16a - Interviews/conferences
- 16b - Obtaining/reviewing records

- 16c - Legal research & Brief Writing
- 16d – Travel time
- 16e – Investigative and other work

Figure 11

B. Completion of the **Expenses** Worksheet

1. Enter the line by line data for "Travel Expenses" and "Other Expenses" activity (**Figure 9**). Mileage entered will automatically be calculated by the rate in effect **as of the date** of that entry. Dollar amounts claimed for expenses, other than mileage, must be manually entered in the appropriate columns. Include a detailed description for all other expenses claimed. (For example, when entering the expense claim for photocopies; the description might read as: "40 copies @ .20 each", then manually enter $8.00 in the "Photocopies" column.)

BOX 17 Travel Expenses
Date
Expense Description (ie, mileage to CCA, or parking)
Travel Miles (enter # of miles only)
Travel Misc. (parking)

BOX 18 - Other Expenses
Facsimile
Long Distance Charges
Photocopies
Postage
Other Expenses

CJA 20 Worksheet - Expenses

Attorney:	Joe Attorney
Defendant:	Jane Defendant
Material Witness:	
Case No:	CR 07-1234-001
Judge:	JMR
Bill Dates	From 5/1/05
	To: 7/29/07

REMEMBER: Hourly rates are determined by the DATE entered, so PLEASE check your work! Date	Expenses Description	17 Travel Miles	17 Travel Misc.	18 - Facsimile	18 - Long Distance Charges	18 - Photocopies	18 - Postage	18 Other Expenses
5/1/06	1 trvl to court	20						
7/29/07	1 trvl to court	20						
7/29/07	3 copies @ .20 each					$0.60		

Figure 12

C.   Locked Cells

1.   As information is entered on the **Services** and **Expenses** tabs, the data will transfer to the **Summary** tab and the **Voucher** tab. Those fields on the **Voucher** tab that have been populated by the **Services** or the **Expenses** tab will be locked to prevent any modifications. If adjustments are needed to those locked fields, the adjustments must be made to either the **Services** or the **Expenses** tab. If an attempt is made to edit a field that is locked on any of the tabs, the following message will be displayed on the screen (**Figure 10**):

Figure 13

Click on **OK** and continue working.

D. The **Summary** Worksheet (completed automatically as information is entered on the **Services** and **Expenses** tabs)

This sheet presents the calculated totals based on hours and miles/expenses entered in the **Services** and **Expenses** worksheets (**Figure 11**).

CJA 20 - Voucher Summary

Categories	1/1/2008 - Current ($100/hour)	5/20/2007 - 12/31/07 ($94/hour)	1/1/2006 - 5/19/07 ($92/hour)	5/1/2002 - 12/31/2005 ($90/hour)
	Hours Claimed	Hours Claimed	Hours Claimed	Hours Claimed
15a - Arraignment/Plea	0.0	0.0	0.0	0.0
15b - Bail/Detention	0.0	0.0	0.0	0.0
15c - Motions	0.0	0.0	0.0	0.0
15d - Trial	0.0	0.0	0.0	0.0
15e - Sentencing	0.0	0.0	0.0	0.0
15f - Revocation	0.0	0.0	0.0	0.0
15g - Appeals Court	0.0	0.0	0.0	0.0
15h - Other	0.0	0.0	0.0	0.0
Total 15a - 15h (Hours)	0.0	0.0	0.0	0.0
Total In-Court x Rate Per Hour	**$0.00**	**$0.00**	**$0.00**	**$0.00**
16a - Interviews	0.0	0.0	0.0	0.0
16b - Records	0.0	0.0	0.0	0.0
16c - Research/ Writing	0.0	0.0	0.0	0.0
16d - Travel Time	0.0	0.0	0.0	0.0

	2/1/2007 - Current (.485 per mile)	1/1/2006 - 1/31/2007 (.445 per mile)	9/1/2005 - 12/31/2005 (.485 per mile)	2/4/2005 - 8/31/2005 (.405 per mile)
17. Travel Miles	Miles Claimed	Miles Claimed	Miles Claimed	Miles Claimed
Total Miles Driven	20	20	0	0
Total Miles x Rate Per Mile	$9.70	$8.90	$0.00	$0.00

17. Travel Misc.	$0.00
17. Total Travel Expenses	$18.60
18. Facsimile	$0.00
18. Long Distance Charges	$0.00
18. Photo Copies	$0.60
18. Postage	$0.00
18. Other Expenses	$0.00
18. Total	$0.60
Grand Total Of CJA Voucher	$111.20

Attorney:
Defendant:
Material Witness:
Case No:
Judge:
Bill Dates
To:

Figure 11

F. Completion of the **Voucher** Tab

Data entered on the **Services** and **Expenses** tabs will carry over to the CJA 20 **Voucher** tab. However, this form requires certain additional information to be entered prior to submission for payment, specifically boxes 1, 3, 8 through 12, 21 and 22. Boxes 6 and 7 must be completed if applicable.

FYI: If you are having trouble checking the checkboxes on the CJA 20 **Voucher** tab in the spreadsheet, then you have neglected to click on **Enable Macros** when launching the spreadsheet. Close the spreadsheet and re-open to get the message again. If you do not get this message, go back to step 2. If you have **Excel 2007**, scroll down to the **Addendum** (page 12). **Please enter and review all information on this form prior to converting to .pdf and e-filing!**

CJAwork copy for training - Microsoft Excel

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| | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | S | T | U | V | W | X | Y | Z |

4 | 3. MAG. DKT./DEF. NO. | 4. DIST. DKT./DEF. NO. | 5. APPEALS DKT./DEF. NUMBER | 6. OTHER DKT. NO.

5

6 | 7. IN CASE/MATTER OF (Cas | 10. REPRESENTATION TYPE

7 | USA vs. John Defend | ppellant | (See Instructions)

8 | ppellee

9

11 | 11. OFFENSE(S) CHARGED (C | f offense.

12

13 | 12. ATTORNEY'S NAME (Firs

14 | AND MAILING ADDRESS

15 | Jo Attorney | tained Attorney

16 | unsel

17

18

19 | ly unable to employ counsel and (2)

20 | Telephone Number: | nterests of justice so require, the

21 | inted to represent this person in this

22 | 14. NAME AND MAILING ADD

23 | Jo Attorney

24

25 | Date of Order

26

27 | Nunc Pro Tunc Date

28 | CLAIM FOR SERVICES AND EXPENSES | FOR COURT USE ONLY

Print dialog:

Print

Printer

Name: \\MOE-TREE\NDPS-Fin-Q-2.MOED.STL.MOE

Status: Idle

Type: HP LaserJet P3005 PCL 5e

Where: NDPSGW LPR HOSTADDRESS=156.127.98.168 PRINTERNAME=PASSTHROUGH

Comment: Finance

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Find Printer...

☐ Print to file

Print range

⦿ All

○ Page(s) From: ___ To: ___

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Number of copies: 1

☐ Collate

Print what

○ Selection

○ Active sheet(s)

○ Table

⦿ Entire workbook

☐ Ignore print areas

Preview | OK | Cancel

| 29 | CATEGORIES (Attach itemization of services with dates) | HOURS CLAIMED | | | TOTAL AMOUNT CLAIMED | MATH/TECH. ADJUSTED | MATH/TECH. ADJUSTED | ADDITIONAL REVIEW |
| 30 | | 3/11/09 - Current ($110/hour) | 01/01/08 - 3/10/09 ($100/hour) | 5/20/07 - 12/31/07 ($94/hour) | | | | |